

DOCUMENT RESUME

ED 172 392

EA 011 815

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 TITLE Planning and Development as Problem-Solving Strategies in Education. A Report on the Richmond (Virginia) Experience.
 PUB DATE 6 Nov 78
 NOTE 28p.; Paper presented to the Annual Meeting of Concerned Leaders in Educational Administration and Research (CLEAR), formerly the Research and Development Association for Education (TRADAE) (2nd, Alexandria, Virginia, November 5-6, 1978)
 EDRS PRICE MF01/PC02 Plus Postage.
 DESCRIPTORS *Change Strategies; Citizen Participation; *Educational Improvement; *Educational Planning; *Educational Strategies; Integration Methods; Needs Assessment; *Problem Solving; School Integration; *School Organization
 IDENTIFIERS Richmond Public Schools VA

ABSTRACT

This paper deals with the events that led to a need for problem-solving measures in the Richmond, Virginia, Public Schools, and describes the planning strategies that have evolved since 1973. Events of the late 1960s and early 70s that had a major impact on the school system included three changes of superintendents (that brought three reorganizations), court-ordered desegregation plans, court-ordered annexation, and a court suit seeking consolidation of the metropolitan school systems. The fall of 1973 marked the beginning of the massive planning project. The development of the school system's educational planning capability can be viewed in two stages, each described in this report. Stage 1 was known as the Educational Services Priority Planning Program or ESP-3 and was based almost entirely on a participatory planning strategy. Stage 2 of the development of planning capability was a more formalized approach and is considered in this paper as having begun with the formation of a department of planning and development.
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PLANNING AND DEVELOPMENT AS PROBLEM-SOLVING
STRATEGIES IN EDUCATION

A Report on the Richmond (Virginia) Experience

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Prepared for Presentation at the
Second Annual Meeting of the Research and Development Association
for Education (TRDAE)

Alexandria, Virginia

November 5-6, 1978

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PLANNING AND DEVELOPMENT AS PROBLEM-SOLVING
STRATEGIES IN EDUCATION: A Report on the
Richmond (Virginia) Experience

Planning is planning is planning. Not so! Yes, it may mean a few people in a "think-tank setting" with flow charts, data collections, analytical reports, statistical charts, research reports, mathematical models, and various bits and pieces of information tacked on the walls. The result of their work would be a well-documented, sophisticated plan which could be issued with orders to implement.

Although the above description was written facetiously, it was not meant to be critical. In some instances, the isolated "top-down" planning approach is appropriate; however, in this report, it didn't happen that way. By "top-down" it is implied that the planning is done at a higher level in an organization and handed down to the subordinate units to implement without their involvement in planning.

This paper will deal with the events which led to a need for some extreme problem-solving measures in the Richmond (Virginia) Public Schools and descriptions of the planning strategies which have evolved since 1973. At a later time, the material outlined in this paper will become the basis for a case study of the effects of the planning strategies in Richmond in solving school problems. No attempt will be made to present findings, conclusions or recommendations at this time, with the exception of some obvious results.

Setting

Richmond, Virginia, is an historical city. Records of the site go back to the time of the Jamestown Settlement (1607) when it was an Indian

village. It was organized as a town in 1742 and became a thriving trading post. When the state capital in Williamsburg was threatened in 1779, during the Revolutionary War, Governor Thomas Jefferson moved the capital to Richmond. It has remained the State Capital since then, as well as being the Capital of the Confederacy during the Civil War.

The history of the Richmond Public School System dates back to 1870 and in spite of the conservatism attributed to the city and state, the citizens have taken pride in their schools and have supported them well.

The events of the late 1960's and early 70's had a major impact on the public school system. Three changes of superintendents in the past decade (which brought three reorganizations), court-ordered desegregation plans, court-ordered annexation, court suit seeking consolidation of the metropolitan school systems, etc., brought the school system to a low ebb.

Desegregation. The Richmond Public Schools were desegregated incrementally beginning in 1960. Racial composition of the schools at that time was 45 percent black and 55 percent white. City population was 42 percent black and 58 percent white.

Following the collapse of the "Massive Resistance," a State strategy to avoid desegregation, in 1959, suit was filed in U.S. District Court on behalf of three black students. In September, 1960, two of the three were assigned to the all-white Chandler Junior High School. This was the first breach for desegregation. Although there was hostility and opposition, the impact of desegregation did not result in violent demonstrations as experienced elsewhere. Based on a freedom of choice policy, approved by the U.S. District Court, an attempt was made to desegregate the schools through natural processes; however, results were slow in coming.

A court-ordered interim plan which called for desegregation in the secondary schools was put into effect in September, 1970, without the

requirement for cross-town busing. The full desegregation plan, called "Plan III," was ordered by the U.S. District Court to be implemented in September, 1971. Plan III called for school pairings, satellite zones, cross-town busing of approximately 21,000 students and the desegregation of schools at all levels. Prior to this time, Richmond Public Schools did not have a transportation system for regular city students.

Annexation and attempt at consolidation. Preceding the court-ordered desegregation decrees in 1970 and 1971, the City of Richmond was awarded 23 square miles of territory and approximately 47,000 people (mostly white) from the adjoining county of Chesterfield by an annexation court, effective January 1, 1970. This action, plus an unsuccessful attempt by the Richmond School Board in 1971 to consolidate the city's school system through the courts with the systems of two adjoining counties to form a metropolitan school system of over 100,000 students, compounded the impact of the desegregation orders. Much bitterness was generated as a result of the annexation, consolidation and desegregation actions by the courts, all within a period of two (2) years.

In the wake of these disruptive events of the late 60's and early 70's, student achievement test scores declined, enrollment declined, teacher performance and morale declined as evidenced by an increasing turnover rate, and student behavior problems increased, not only in number but in degree of violence within the schools.

A change of superintendents in the summer of 1972 brought new resolve to turn things around. An external consulting agency was hired to conduct a study and make recommendations for reorganization. The result was a change from the centralized organizational pattern to a decentralized pattern consisting of three area administrators and staffs in addition to the superintendent's office and staff. The reorganization was implemented in the

summer of 1973. The decline of the schools' enrollment and the city's population was not anticipated at that time, therefore the solution to many of the internal problems of the school system seemed to be to put top administrators with staffs out closer to the schools and communities.

Early in the fall of 1973, the superintendent (Dr. Thomas C. Little) organized a series of retreats for central office administrators, supervisors and principals to orient them fully to the new organization and policies as well as to discuss issues, problems and needs facing the school system in its troubled state.

These retreats marked the beginning of the massive planning project which followed. Under the direction of the newly appointed Associate Superintendent for Educational Services (Dr. Richard C. Hunter) and his Educational Services Cabinet, a massive "participatory" planning process was designed - sometimes called a "collaborative" process. The basis for the planning activities was to be the needs which were identified at the retreats.

Need identification process. Even though the retreats provided an exhaustive list of needs, it was decided that it would be desirable to seek input from sources other than the administrators and supervisors to strengthen the validity of the need identification process. Specific groups - teacher, parent, student, PTA, and other ancillary staff groups - were asked to submit their ideas. Formal meetings as well as informal "coffee klatches" were held throughout the city by the school-community coordinators to discuss the schools' problems.

As the need identification process unfolded, there appeared to be some duplication of suggested ideas. This tended to enhance the validity of certain items, particularly those receiving nomination by several groups or individuals. The repetition also indicated that most of the educational

needs had been identified.

Of course, the purpose of the needs identification process was to provide material for planning program improvements to eliminate the needs. The question of "What to do next?" begged an answer.

Planning strategies. The development of the educational planning capability of the Richmond Public Schools can be better understood if viewed in two (2) stages. Probably a more appropriate word would be "evolution" than "development" because the skills of planning emerged throughout the system.

Stage I, described below, was known as the "Educational Services Priority Planning Program" or "ESP3" and was based almost entirely on a participatory planning strategy. "Participatory planning" in education has been described as "involving citizen participation, along with school personnel, in an educational planning process which seeks to develop group consensus on needs, goals and objectives and strategies for program improvement." (Stromquist and Johnson, 76.) Stage I of the Richmond experience adhered to this concept.

Stage II of the development of a planning capability was a more formalized approach and is considered in this paper as having begun with the formation of a department of planning and development. A description of this department follows the section on Stage I.

STAGE I

THE EDUCATIONAL SERVICES PRIORITY PLANNING PROGRAM (ESP³)

Once the initial need identification process had been completed, it became evident that some sort of systematic planning was necessary if efficient resolution of the needs was to be realized. The Associate Superintendent for Educational Services (Dr. Richard C. Hunter) and his Cabinet developed a design which followed the usual steps in program planning: Identify Needs; Set Priorities; Develop Goals and Objectives; Plan, Implement, and Evaluate Programs; and, Modify Program on Bases of Evaluation. The plan became known as "ESP³" which stood for "The Educational Services Priority Planning Program."

Setting priorities. The identified needs were listed and distributed to each Cabinet member with instructions to rank individually each item after consultation with his immediate staff. Individuals were then asked to furnish sufficient copies for all Cabinet members of their rankings.

The individual rankings were summarized and reduced to transparencies and used to assist in identifying common rankings and overall group priorities. Every item was then rated jointly by the Cabinet. Items marked 1 denoted the highest rating, 2 next, and 3 the lowest priority.

Grouping by categories. When all items had been given priority ratings, they were grouped into six (6) categories: (1) Staff Development; (2) Planning and Evaluation; (3) School-Community Relations; (4) Utilization of Physical and Human Resources; (5) Instructional Program Development; and, (6) Procedures and Guidelines. A task force for each respective category was to be appointed to work as assigned.

Task force goals and objectives. An important part of the process was to provide each task force with specific instructions on each task to be accomplished. A team was appointed by the Cabinet to write individual goals and objectives on all specified needs. An example is given in Appendix A to illustrate the direction given the task force members. Also, a handbook was developed for each task force which included:

1. Members' names
2. Introductory statement
3. Flow chart of the planning process
4. Guidelines for the respective task forces
5. Objectives to be accomplished
6. Timetable for reporting
7. Reporting procedures and forms
8. Bibliography of recommended references

When the task forces were appointed, they had specific directions and could go immediately to the tasks without having to stop and wonder what they were supposed to do.

The Task Forces

Six individual planning task forces were established. They included: staff development, planning and evaluation, school-community relations, utilization of physical and human resources, instructional program development, and procedures and guidelines. Each task force was subdivided into two committees: working and advisory.

Working committees. The working committees were expected to perform most writing and program development for each task force. They, out of necessity, met at prolonged sessions, sometimes expending three or four hours per day for several successive days. Individuals assigned to these committees were able to spend that amount of time. Numerically, this group was small, possibly five or six people in all. All plans developed by the working committees had to be approved by their respective advisory committees before submission to the Cabinet.

Advisory committees. The advisory committees were much larger than the working committees. Composition of these committees was approximately 40 persons per task force which typically included the following membership:

6 teachers
16 parents
6 students
3 principals, vice-principals
5 other administrators, supervisors, counselors, psychologists, and social workers
4 non-certified personnel
<u>40</u>

The primary role of the advisory committees was to evaluate all plans developed by the working committees. Meetings were brief and utilized a critique format. The committees met jointly on a bi-weekly or monthly basis for one or two hours in the evening to facilitate maximum participation.

The advisory committee members were expected to keep their various constituents informed regarding the planning status and, in turn, supply their colleagues' reactions to the proposed program designs.

Standards of Quality Council. At virtually the same time needs were being identified by the Cabinet, the Superintendent of Schools and the Richmond School Board appointed membership for the 1973-74 "Standards of Quality Planning Council" (hereafter referred to as the Council).

This body grew out of the statutes enacted by the General Assembly of the Commonwealth of Virginia to guide local school division planning for improved educational quality. The purpose of the Council was to advise the School Board of the status of Richmond Public Schools in relation to the Commonwealth of Virginia's Standards of Quality for local school divisions. Further explanation is included later.

The Council had a diverse membership including students, parents, School Board members, and division administrators. In order to benefit from this diversity, the Cabinet desired to involve the Standards of Quality Council in the planning process.

The organizational chart entitled, "Richmond Public Schools Educational Services Priority Planning Program Organizational Chart," shown on the next page, indicates this role. Conceptually, a plan approved by the Cabinet would be examined by the Council before implementation was recommended to the Superintendent or the School Board.

It was determined that the Council would continue to consider the identified educational needs while pursuing their primary responsibilities of monitoring the district's progress in meeting state quality standards. Needs identified by the Council via this process were turned over to the Cabinet for goal and objective development and appropriate task force assignment.

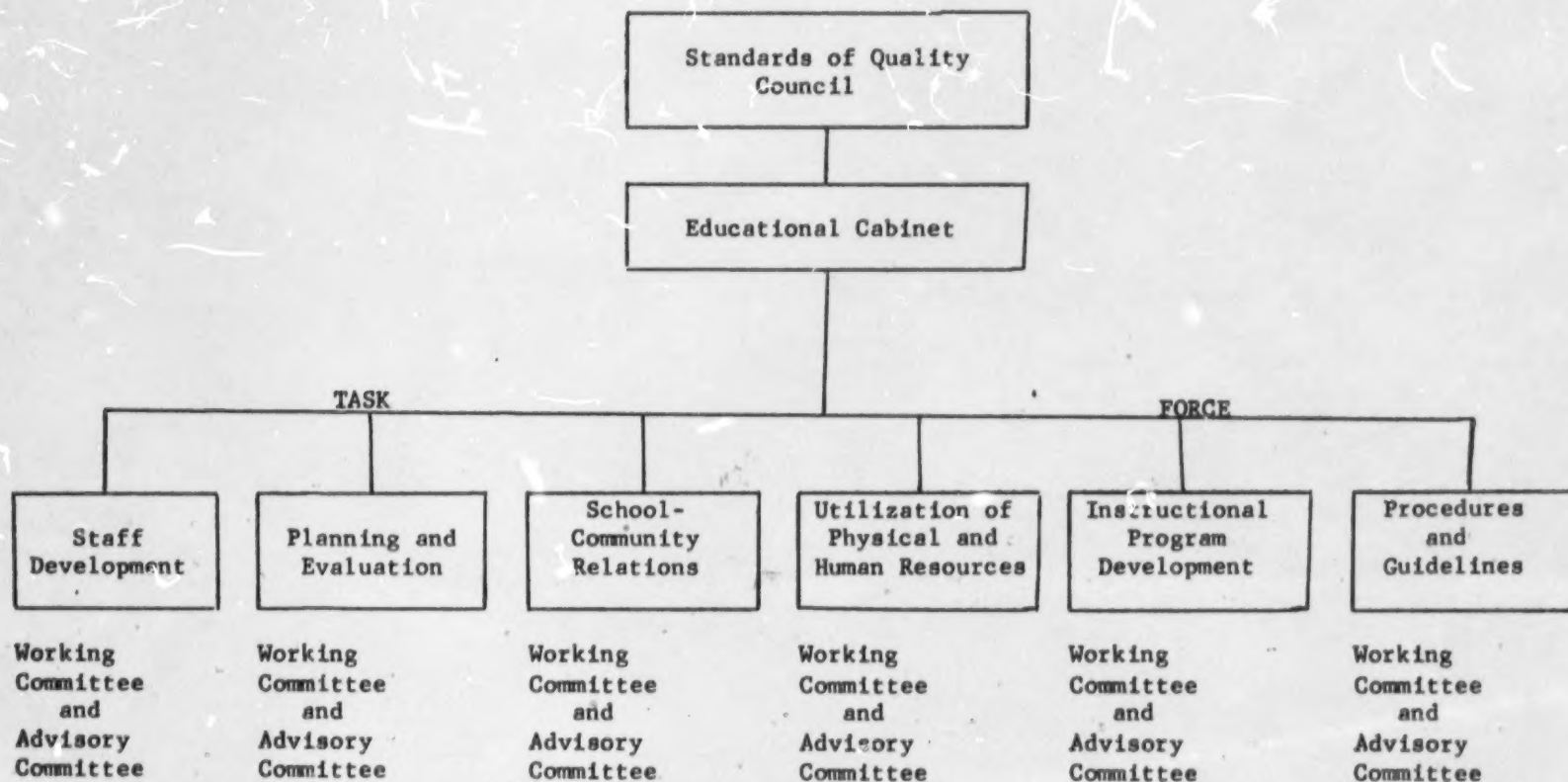
The Cabinet served as a clearinghouse for the large volume of proposals and studies which flowed from the six (6) task forces. Members of the Cabinet also served as co-chairmen of the task forces. The dual roles facilitated communication and appropriate planning of the various ESP³ activities.

All proposed plans developed by the individual task forces were submitted directly to the Cabinet for review and approval. Hearings were held to which the public was invited. Those plans which were approved were then sent to the Standards of Quality Council for their consideration.

ESP³ Summarized

In retrospect, the work which was done during the two and one-half year period of ESP³ activities was invaluable to the effort to turn the school system around. Over 1,000 people - students, teachers, administrators, supervisors, parents, citizens - were actively involved at some time during the period. The effects of ESP³ can still be seen in the programs which were actually implemented; the knowledge and capabilities for planning which were

RICHMOND PUBLIC SCHOOLS EDUCATIONAL SERVICES PRIORITY PLANNING PROGRAM ORGANIZATIONAL CHART



developed; and, the many personal relationships which resulted from the meetings. It was interesting to note that the Richmond Chamber of Commerce had the highest contingent in a number of the meetings, outside of the school personnel.

The ESP³ activities, outlined above, extended over the years 1973-74, 1974-75, and through the fall of 1975-76. A rather high level of interest was maintained over the two-year period; however, in the fall of 1975 the project began to wind down.

As expressed earlier in the paper, the ESP³ program adhered to the usual design of participatory planning. Some of the characteristics which could be identified in the process were:

1. The process provided a vehicle for comprehensive participation by various types of individuals in a group process, where diverse points of view could be expressed while working toward a consensus.
2. It was a problem-solving process where the problem could be addressed in a rational, logical, analytical and systematic manner - step by step.
3. It was an educational process. Participants learned as they worked.
4. It was a political process. In the consensus building process, many times priorities were determined and recommendations were made which led to allocation of resources or decisions of who gets what and why.
5. It was a communication process which informed and provided feedback on actions taken.
6. It was a change process which flowed naturally into a "management by objectives" plan.
7. It became a continuous process with periodic updating of the plans.
8. It allowed for research findings to be integrated into the process.

At the time the process was used in Richmond, it seemed to be the best approach. In retrospect, it still seems to have been a wise decision. The

circumstances called for a major effort.

FOCUS ON THE DEVELOPMENT OF THE PLANNING CAPABILITIES

The impact of the ESP³ experience became a major factor in the development of the planning capabilities of personnel throughout the school system.

The ESP³ project was thoroughly documented; therefore, a reconstruction of the events is fairly simple. Beginning with the initial identification of approximately 200 needs, there were a number of items which called for "planning-type" activities. Some examples of these identified planning needs were:

1. Need to develop a cadre of evaluators in system
2. Need to develop procedures (model) for program development
3. Need to determine goals for Richmond Public Schools
4. Need to develop models for planning
5. Need to increase staffs', parents', and students' involvement in decision-making, planning, etc.
6. Need more basic information
7. Need building-use survey
8. Need to improve budget preparation procedures
9. Need to develop criterion referenced tests
10. Need to evaluate current programs

The ESP³ Planning and Evaluation Task Force was given specific objectives to accomplish which flowed from these types of identified needs. For the most part, their work centered on developing models as well as plans and procedures to accomplish the objectives.

The Planning and Evaluation Task Force, assisted by the Department of Research, conducted a series of staff development sessions in the

spring, 1974, for central office administrators and supervisors, and principals and assistant principals. Also included in the training sessions were the curriculum specialists, a newly created position in each school to give close support to the teachers in improvement of instruction. They also became the chief planners in each school.

Impact of State Standards of Quality. Concurrently, the State mandated Standards of Quality were having their effect. The Standards of Quality and Objectives were first established by the State Board of Education in August, 1971, and were revised and enacted by the Virginia General Assembly, effective July 1, 1972. An item in the section on Planning and Management Standards stated:

The superintendent shall develop the capability, procedures and organizational structure to enable the school division to plan for future needs; and

The superintendent shall involve the community and his staff in the preparation of a five-year plan, which shall be updated annually. Such a plan shall be based on a study of the extent to which pupils are achieving the . . . objectives formulated by the Board of Education and shall be designed to raise the level of pupil performance. This plan shall be reviewed and approved by the School Board and submitted to the State Superintendent of Public Instruction for approval by the Board of Education.

Also, under the section on Individual School Planning and Management, the following objective was stated:

The principal shall involve the community and his staff in the preparation and implementation of an annual school plan, which shall be consistent with the division-wide plan and which shall be approved by the division superintendent.

A third dimension of planning requirements in the standards was under the section on Classroom Planning and Management Objectives which required that "teachers shall be responsible for humanizing instruction, providing for individual differences, using available instructional materials and other

resources effectively, organizing learning activities to achieve specific objectives, providing a favorable psychological environment for learning, and evaluating pupil progress."

In 1974, a series of staff development sessions was conducted by members of the Department of Research to assist administrators and supervisors in fulfilling the State's requirements. A handbook was developed to assist the individual school planners in working up their annual school plans. From these beginnings, each year the Annual School Plans have become more expertly done than the previous year. Also, because each member of the respective faculties has been involved to some degree in developing his/her school's goals, objectives and strategies, the plans are more than a mere piece of paper. Status reports are submitted at the end of the year to report on the achievement of objectives which were stated the year before.

STAGE II

THE DEPARTMENT OF PLANNING AND DEVELOPMENT

In the report of a study made in 1973 by an external agency of the organizational structure of the Richmond Public Schools, one of the recommendations was that: "A new Department of Planning and Development should be initiated." The report further stated that this new department was needed to develop and implement a formal planning program, and that the functional responsibilities should include the following:

1. Long-range administrative planning
2. Program planning and budgeting system
3. Management information services
4. Research - including basic (in conjunction with colleges and universities), applied and operational
5. Expanded program evaluation
6. Coordination of federal programs

Such a department was not established immediately, in spite of the obvious need. The delay proved to be a wise decision on the part of the administration, for two (2) reasons:

1. The ESP³ participatory planning process changed attitudes and perspectives of people (both school and community) to the point of accepting the notion of planning for the future.
2. Sufficient skills and expertise was not available for formal planning by incumbent personnel. Much had to be learned.

On February 1, 1976, the fourth change in superintendents in less than a decade occurred. Dr. Richard C. Hunter, the former Associate Superintendent for Educational Services who guided the ESP³ planning activities, as well as other planning functions, became superintendent. The reorganization of the central office which came in July, 1976, included a major department to be called, "Department of Planning and Development."

The initial concept of the department as recommended in the 1973 study was followed; however, some changes in emphasis were made. Chart No. 2 on the next page outlines the specific functions which the department was to prepare to assume. Not only was efficiency expected to improve by bringing the various functions together and cutting down on duplication, but the data and information generated from the various reports, program planning and budgeting, group testing, etc., formed the basis for a comprehensive Management Information System for decision-making and long-range planning. The director reported to the superintendent in the initial reorganization.

Putting It All Together

The rationale for bringing the various functions together in one department was to be able to interface them in developing the total planning function within the school system. The major functions which were brought into the Department of Planning and Development were formerly located as follows:

<u>Function</u>	<u>Former Location</u>
1. Accreditation	Instruction
2. Budget Preparation	General Administration
3. Data Processing	General Administration
4. Evaluation	Research
5. Management Information	Research
6. Program Planning	Research
7. Research	Research
8. Testing, Group	Pupil Personnel Services

As the members of the new department set to work on developing the functions assigned to them, an overall design was mapped out and departmental

FUNCTIONS

DEPARTMENT OF PLANNING AND DEVELOPMENT

PLANNING AND EVALUATION
SECTION

1. Educational Planning
 - 1.1 Summative evaluation
 - 1.2 Group testing
 - 1.3 Educational planning
 - 1.4 Support school level planning
2. Research
 - 2.2 Conduct and/or coordinate research activities within the scope of the planning process
 - 2.3 Coordinate research conducted by college and university personnel
3. Program Development
4. Accreditation
 - 4.1 State
 - 4.2 Southern Association

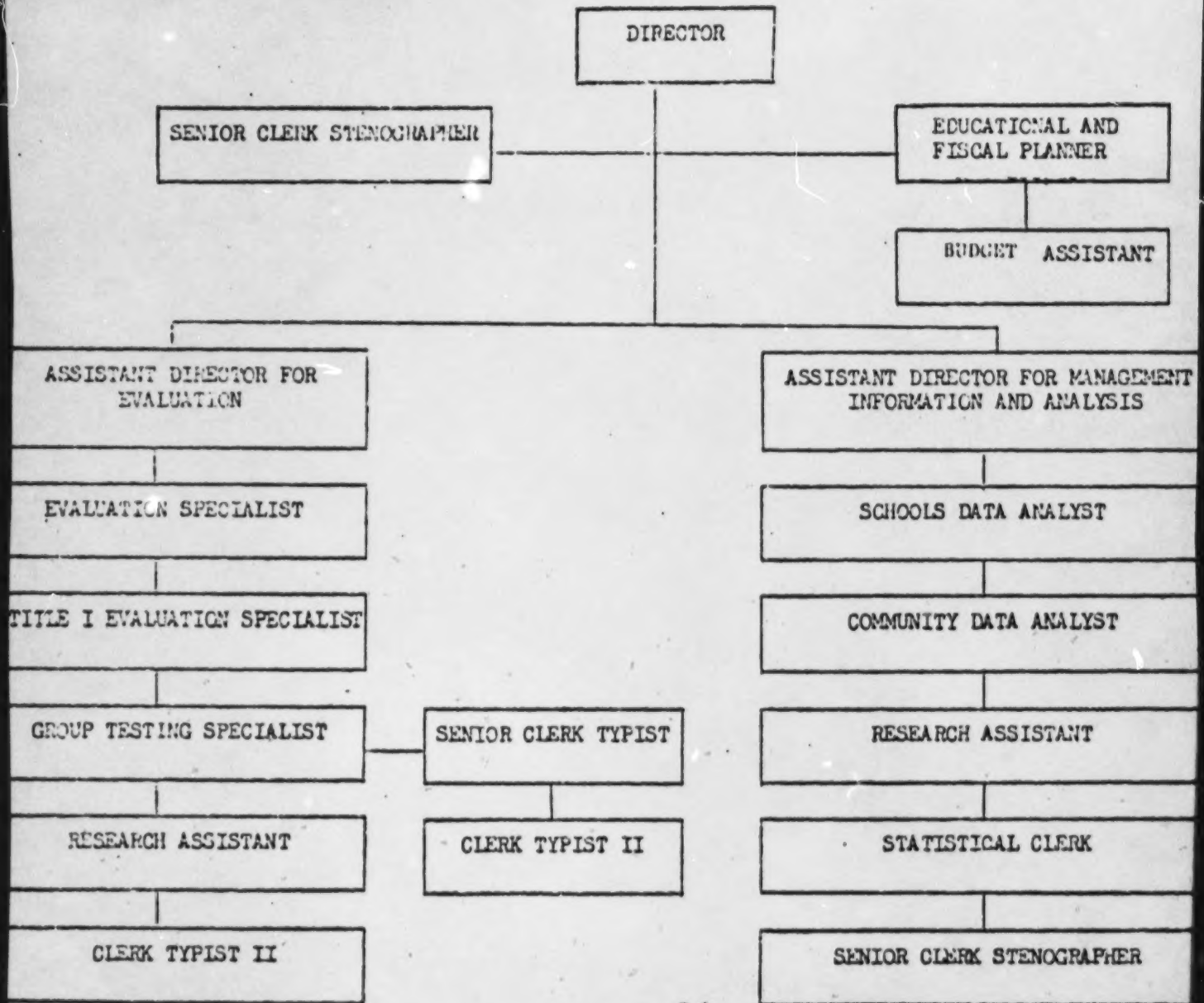
MANAGEMENT INFORMATION
AND ANALYSIS SECTION

1. Data-based Information System
 - 1.1 Collect, analyze, interpret and report on schools data
 - 1.2 Collect, analyze, interpret and report on community data
 - 1.3 Develop and maintain efficient information storage and retrieval systems
 - 1.4 Develop appropriate reports of management information for regular and special distribution as needed
2. Utilization of Facilities
3. Coordination of Reports
 - 3.1 Coordinate all reports, response to questionnaires, etc., requested of the division
 - 3.2 Verify uniformity of information being reported

FISCAL PLANNING
SECTION

1. Collect, analyze, interpret and report on fiscal data
2. Develop and maintain program budget integrated with planning process
3. Prepare function/object budgets as needed
4. Long-range planning

CHART #2
 ORGANIZATIONAL STRUCTURE
 DEPARTMENT OF PLANNING AND DEVELOPMENT



committees were created to work out strategies and procedures for bringing their work together.

To guide the development of the department, the following mission statement and goals were formulated:

Mission

The primary mission of this department is to provide leadership and support to the administrative decision-makers in planning and developing instructional programs, administrative and operational functions and accountability procedures.

Goals

1. To foster effective planning, evaluation, development and related practices throughout the system.
2. To develop and maintain long-range planning at the system level.
3. To develop and maintain a basic management information and analysis capability.
4. To foster basic research activities as appropriate for the school system.
5. To coordinate planning of programs and resources.
6. To provide staff development support in planning and development functions.

During the intervening period - from 1976 to the present writing in 1978 - much has been done by the "P&D" Department in attempting to fulfill its mission. This paper does not propose to report on the level of its success or effectiveness; however, a subsequent case study will attempt to analyze the impact which the planning strategies have had in the solution of some of the school problems.

SUMMARY

The concept of planning and development has become a "way of life" in the Richmond School System, primarily through the evolution of the processes described in this paper. The systematic and analytical techniques

of planning are accepted, generally, as the way that problems "should" be solved. Sometimes factors intervene that prevent the carrying out of the full process, e.g., pressure of time, political pressures, conflict of opinions, etc.; however, the basic notion of determining goals and objectives, program plans and implementation strategies with subsequent evaluations and feedback is well established.

Increasingly sophisticated techniques are being developed for automated data analysis and various uses of the computer, in addition to the standard student information system, scheduling and reporting, personnel data records, and finance accounting systems. Some of these are: computerized instructional management systems, test data item analysis, longitudinal and comparative test data analysis, automated spot mapping using the Dual Independent Map Encoding (DIME) system, computerized membership projections, and various management information reports.

The underlying attitude of the current Administration and School Board in Richmond is that they cannot afford to let things "work themselves out" but that planning skills and techniques based upon solid data and information must be developed to improve the schools and prepare them to educate children for the future. The current Superintendent and School Board are committed to this approach and are providing the leadership in developing this capability.

APPENDIX A

1.14 Program Planning

Goal Statement

The goal of staff development activities relating to program planning is to develop principals' abilities to plan by utilizing a model incorporating needs assessment and the development of goals and objectives followed by program planning, implementation, evaluation, and modification.

1.141 Conducting Needs Assessment

Specific Objectives:

- 1.1411 To develop an understanding of the procedures of needs assessment.
- 1.1412 To develop competence to conduct needs assessment within their schools.

1.142 Developing School Goals and Objectives

Specific Objectives:

- 1.1421 To develop skills required to write operationally stated school goals and product objectives based upon results of needs assessment.
- 1.1422 To develop skills required to prioritize goals and objectives.

1.143 Program Planning

Specific Objectives:

- 1.1431 To develop an understanding of the process of program development.
- 1.1432 To develop abilities needed to plan programs for attainment of school goals and objectives.

1.144 Program Implementation

Specific Objectives:

- 1.1441 To develop skills needed to specify operationally stated process objectives necessary for program implementation.
- 1.1442 To develop skills needed to plan monitoring systems that can be utilized to determine if process objectives are being implemented as planned.

1.145 Program Evaluation

Specific Objectives:

- 1.1451 To develop an understanding of the procedures involved in designing summative (product) and formative (process) type program evaluations.
- 1.1452 To develop the ability to collect and analyze product and process data for the purpose of determining the extent to which product and process objectives are attained.

1.146 Program Modification

Specific Objective:

- 1.1461 To develop an understanding of how results of the formative evaluations may be used for program modification.

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NOTE: The primary source documents for this paper were records and reports from the Richmond Public Schools, Richmond, Virginia.